

GETTING STARTED WITH PRESEASON PLANNER

Overview

The undisputed, single largest objective when purchasing product is buying at the right time, in the right quantities, at the lowest cost. When seasonality is a factor in this process, this introduces extra complexity. The Preseason Planner solution provides upfront visibility to buying for the season in the most economical fashion, reduces guess work, lessens order time, and eliminates the need to ‘swivel’ between different reports and systems to make informed decisions. Leverage the Preseason Planner for all major, seasonal categories, including but not limited to, Lawn & Garden, Holiday, and Winter Goods. Outlined below is the recommended process flow.

Before You Begin

Important!

- In order to fully maximize the use of the Preseason Planner, you must be transmitting point-of-sale data back to Ace.
- If you are a Mango subscriber, to avoid the possibility of conflicting suggestions, SKUs reported in the Preseason Planner do not appear in Mango’s ACENET show buying guide.

Tasks List

1. [Identify the Season to Work](#)
2. [Determine Whether to Allow for Dropship Ordering](#)
3. [Optional: Apply Growth/Decline Percentage to Suggested Order Quantities](#)
4. [Work Each Buying Tab](#)
5. [Submit Orders for Products Shipping from RSC](#)
6. [Submit Orders to Dropship Vendors](#)

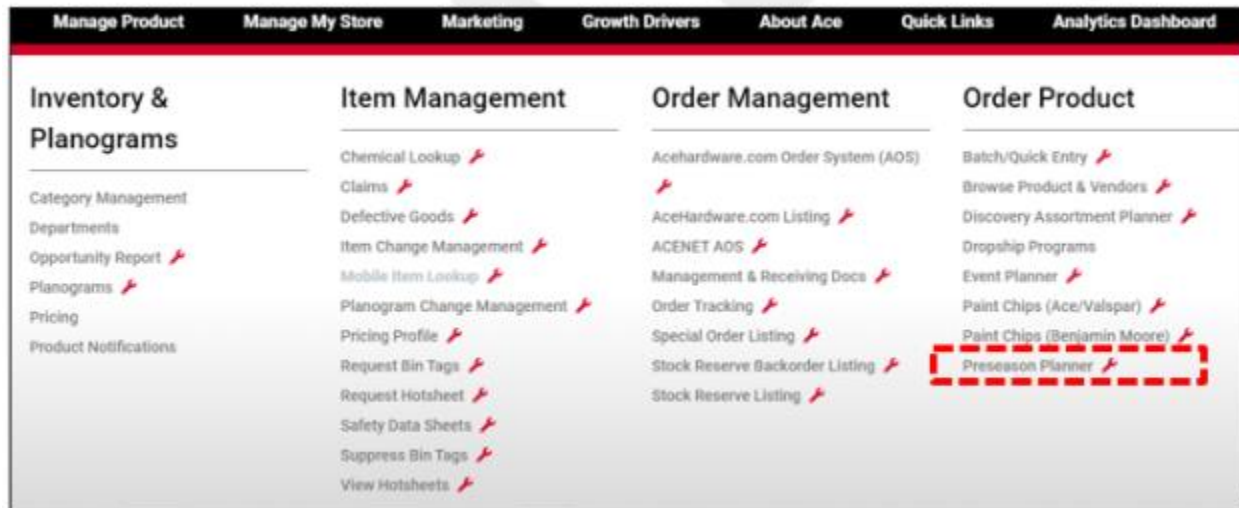
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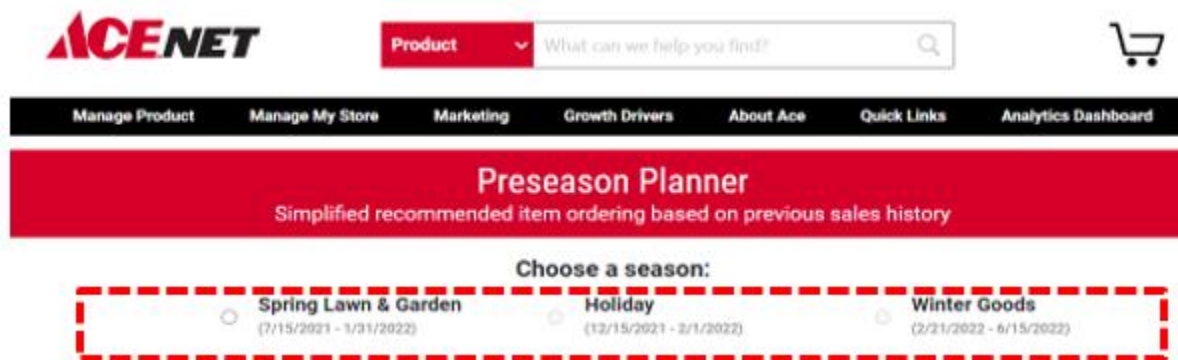
Tasks - Details

Task 1 – Identify the Season to Work

From ACENET, click **Manage Product > Order Product > Preseason Planner**



From the opening Preseason Planner page, select the specific season you are interested in planning for Preseason purchase (e.g. Spring Lawn & Garden) based on the outlined buying windows. Upon doing so, products associated with that seasonal timeframe are displayed.



Note: Though it is optimal to utilize the Preseason Planner for the initial, Preseason buy, replenishment purchases are best managed via your point-of-sale system.

Task 2 – Determine Whether to Allow for Dropship Ordering

Under Manage settings, click the **Include Dropship** button which displays a list of vendor candidates for cost savings by purchasing them via dropship. If there are certain suppliers you would prefer not to buy through this purchase channel, uncheck them from the list so products from those vendors are recommended to buy in the other buying tabs. This also re-calculate

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suggested buy quantities. Be aware, however, not buying through the dropship channel may compromise cost savings.

Include Dropship ×

Set Dropship

☐ Select All

<input checked="" type="checkbox"/>	11908 WEBER-STEPHEN PRODUCTS CO
<input type="checkbox"/>	69348 REDI-GRO CORPORATION
<input checked="" type="checkbox"/>	90127 THE SCOTTS MIRACLE-GRO COMPANY
<input checked="" type="checkbox"/>	36390 TRAEGER PELLET GRILLS LLC

APPLY **CANCEL**

Task 3: Optional: Apply Growth/Decline Percentage to Suggested Order Quantities

If the business is projecting a notable change in sales this season versus the average sales of the last two seasons. It is a best practice to apply a growth/decline value, if your business is expected to be up/down in a given merch class by more than 15%. To illustrate, if you expect sales for small handle tools to increase by 20% this season, this merch class is a candidate for this feature.

To view the sales trend and apply a growth/decline in business, under Manage settings, click the **Apply Growth %** button. Applying a percentage factor will drive increases/decreases to the Preseason Planner's recommended buy quantities.

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Growth Multiplier ✕

Set Growth Multiplier % Apply to All
Apply a growth multiplier to individual merchandise class

Previous 2-year trend	Merchandise class	Enter %	Previous 2-year trend	Merchandise class	Enter %
25 %	188 Power Washers	<input type="text" value=""/>	25 %	744 Fertilizers	<input type="text" value=""/>
25 %	374 Lawn & Garden Lighting	<input type="text" value="50.00%"/>	25 %	745 Hydroponics	<input type="text" value=""/>
25 %	434 Home A/C & Dehumidifiers	<input type="text" value=""/>	25 %	746 Bag Products	<input type="text" value=""/>
25 %	435 Evaporative Coolers/Accs	<input type="text" value=""/>	25 %	747 Plant Food	<input type="text" value=""/>
25 %	456 Patio Heaters & Firepits	<input type="text" value=""/>	25 %	748 Sprayers/Dusters	<input type="text" value=""/>
25 %	528 Sign Posts & Accessories	<input type="text" value=""/>	25 %	749 Salt - Water Ag And Pool	<input type="text" value=""/>
25 %	609 Fans	<input type="text" value=""/>	25 %	750 Insecticides/Repellents	<input type="text" value=""/>

CANCEL APPLY

For additional assistance on this step, see **How to Apply Growth percentage**.

Task 4: Work Each Buying Tab

Work each of the four distinct buying tabs in the sequence displayed. The tabs appear in the order of the deadline associated with them.

1 Show Deals 2 Discovery Edge 3 Dropship 4 Stock Up

Overall Grand Total MULTI-STORE EXPAND

Recommended	SKUs: 341	Cost: \$76,021.07	Potential Savings: 15 %	Cu.ft: 8374.097
In your cart	SKUs: 0	Cost: \$0.00	Your Savings: 0 %	Cu.ft: 0
Submitted	SKUs: 0	Cost: \$0.00	Your Savings: 0 %	Cu.ft: 0
Remaining deals	SKUs: 341	Cost: \$76,021.07	Potential Savings: 15 %	Cu.ft: 8374.097

Note: All four buying tabs may not be available for certain seasons.

Multi-Store Note: Use the multi-store button to action all or a select number of stores at one time. Recommended quantities to purchase will differ per store based on sales history and store inventory position. Delivery date of orders and payment terms selected can also vary by store.

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Below outlines the four different buying tabs and associated actions with each one:

A. Show Deals:

1. Review and work the **Remaining Recommended** items list. Products in this view are the Preseason Planner's suggested buys, and default to purchasing according to historical sales (i.e. By Sales), Ace's best practice. At a basic level, the suggested value displayed in the **Qty Left** field is the recommended purchase amount driven by the following calculation:

$$\text{Qty Left} = \text{Season Unit Sales} - \text{Current Inventory Position} - \text{Cart Quantity}$$

Note: The above result is rounded to the to the order multiple. The Preseason Planner rounds up if the recommended quantity is 75% or more of the next order multiple but rounds down otherwise.

SKU	Item Description	Rec Qty	Pending In Cart	Qty Left	Order Qty	Offer Cost	Future Cost	Offer OM	Sa
1408259	POWER WASHER ELEC1600PSI	4	0	4	<input type="text"/>	\$72.27	\$80.30	4	1
4002461	FIRE PIT PROPAN SQR 28"	2	0	2	<input type="text"/>	\$92.43	\$113.48	1	1
4003578	FIRE PIT WOOD RND 35"D	1	0	1	<input type="text"/>	\$79.44	\$87.88	1	1
4300950	FIREPIT 28" STEEL BLACK	1	0	1	<input type="text"/>	\$64.11	\$72.15	1	1
4426250	NOMA FIRE PIT	3	0	2	<input type="text"/>	\$80.99	\$92.41	1	1
...

$$\text{Qty Left} = \text{Season Unit Sales} - \text{Current Inventory Position} - \text{Cart Quantity}$$

- **Season Unit Sales** – This value is calculated based on the average sales for the item over the last two seasonal periods. It is intended to cover the store for the majority of the seasonal timeframe. More specifically, the season unit sales and timeframe accounts for:

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a. The store's geographic location (e.g. an Ace store in Illinois will have a different selling season than a store in Florida). Though the seasonal timeframe varies by state, the core seasonal window for Lawn and Garden is March through June. Click the **More Info** link on the Season Unit Sales column header for further detail.

b. An Ace based pre-determined percentage of time to cover. Coverage will change from one season to another. To illustrate, the sales coverage calculation aims to cover roughly 70% of sales for Spring Lawn and Garden, but for Holiday, it covers 100% of the total season.

c. Any growth/decline factor applied in the previous step.

d. Items that have experienced significant retail support center (RSC) fill rate issues in the prior season.

e. E-commerce sales history and promotional sales history.

Notes:

- If the item is on promotion and new to your store, seasonal unit sales is based on the average sales per store in your territory.
- Promotional sales are decreased for items not being promoted in the upcoming season but was in the past. Sales for the item are decreased to the average monthly sales for the season.

$$\text{Qty Left} = \text{Season Unit Sales} - \text{Current Inventory Position} - \text{Cart Quantity}$$

- **Current Inventory Position** – This is the sum of the store's current quantity on hand plus quantity on order for the SKU. The quantity on order is based on product expected to arrive in the next 14 days.

$$\text{Qty left} = \text{Season Unit Sales} - \text{Current Inventory Position} - \text{Cart Quantity}$$

- **Cart Quantity (i.e. Cart)** – This is any quantity you previously specified to purchase, which accounts for cart quantities submitted in the other buying tabs, and previously submitted quantities. Cart Quantity excludes customer orders placed through customer priority orders, ship to customer, and stock reserves.

Example: An item with an order multiple of 1 has sold, on average, 10 units for the timeframe that covers the season. If there are a total of 3 units on hand plus on order, and no action has

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been taken to update the cart as of yet, the Preseason Planner will recommend 7 units (10 – 3 – 0 = 7) in the Qty Left field to buy.

Tips:

- Clicking Qty Left link for a given SKU updates the cart with the Preseason Planner's recommended purchase quantity.
 - From time to time, review the **Overall Grand Total** button above the SKU level grid. This is a summation of purchases and savings across all four buying tabs.
2. Review and take action against the section titled **New Item Profit Opportunity**. This provides a listing of the top 200 items you currently do not stock, but at least 10 stores in your territory stock them, and have proven to be top gross profit drivers for those retailers. If it is a Discovery related item, the SKU will have a recommended order quantity equivalent to the planogram amount. If it is non-Discovery based, the suggested order quantity will be the order multiple, or 2 if the order multiple is 1.

For additional assistance on this step, see **How to Order Show Deals in the Preseason Planner**.

B. **Discovery Edge** – The Discovery Edge tab comprises a listing of seasonal 'level 2 and 3' reset related products not in your purchase or sales history (i.e. new items). This tab ultimately routes you to review and make purchases through the Assortment Planner application based on Ace's recommended planogram quantities. For additional assistance on this step, see **How to Order Discovery Edge in the Preseason Planner**.

C. **Dropship** – Review and take action against the **Remaining Recommended** items on a vendor-by-vendor basis. These are the products the Preseason Planner suggests get ordered based on sales history, current quantity on hand, on order, growth/decline percentage (if specified) using the same logic referenced under Show Deals section above. Follow the same steps outlined in the Show Deals section.

Important!

- Suggested quantities in the dropship buying tab are not driven by meeting vendor order minimums. Click the **Dropship By Vendor** button to view a listing of the supplier criteria / order minimums to determine if sufficient quantities are being purchased to meet buying thresholds.
- Orders for dropship are to be processed directly in your point-of-sale system (e.g. Eagle). These cannot be placed in ACENET. As such, upon assessing and editing recommended order quantities, export the SKU grid information by vendor to be shared with dropship suppliers for further review.

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For additional assistance on this step, see **How to Order Dropship in the Preseason Planner**.

D. **Stock Up** - Order discovery related SKUs by merch class, which includes extended dating. Review and take action against the **Remaining Recommended** Like the Show deals buying tab, these are the products Ace suggests get ordered based on sales history, current quantity on hand, on order, growth/decline percentage (if specified) using the same logic referenced under Show Deals section above. Follow the same steps outlined in this section.

Important! Though it is the default recommendation to buy based on covering sales for the season (i.e. By Sales), there is also an option to limit buying based on space under the Stock Up tab. In this case, recommended purchases look to cover the store through the majority of the season, but then limit the suggestion based on Ace's planogram shelf and hook size standards. Non-planogram related items will have a recommended order quantity equivalent to the order multiple; or 2 if the item is in an order multiple equal to 1.

For additional assistance on this step, see **How to Stock Up in the Preseason Planner**.

Task 5: Submit Orders for Products Shipping from RSC

Placing your order in ACENET automatically creates a Reverse PO in Eagle upon transmission, updating quantity on order. Items that are ordered on the Show Deal tab appear in Event Planner cart, while Discovery Edge and Stock Up will appear on the Discovery Assortment Planner Tab cart.

Notes:

- For additional assistance on this step, see **How to Submit your Preseason Planner Order**.
- For additional information, see the Ace Way of Retailing best practice titled Purchasing and Receiving Ace Order Process. Path: ACENET > About Ace > Ordering > Operations Manual – Ace Way of Retailing – AWOR Search: Puurchasing and Receiving Ace Order Process > Task 2 – Implement Reverse PO.

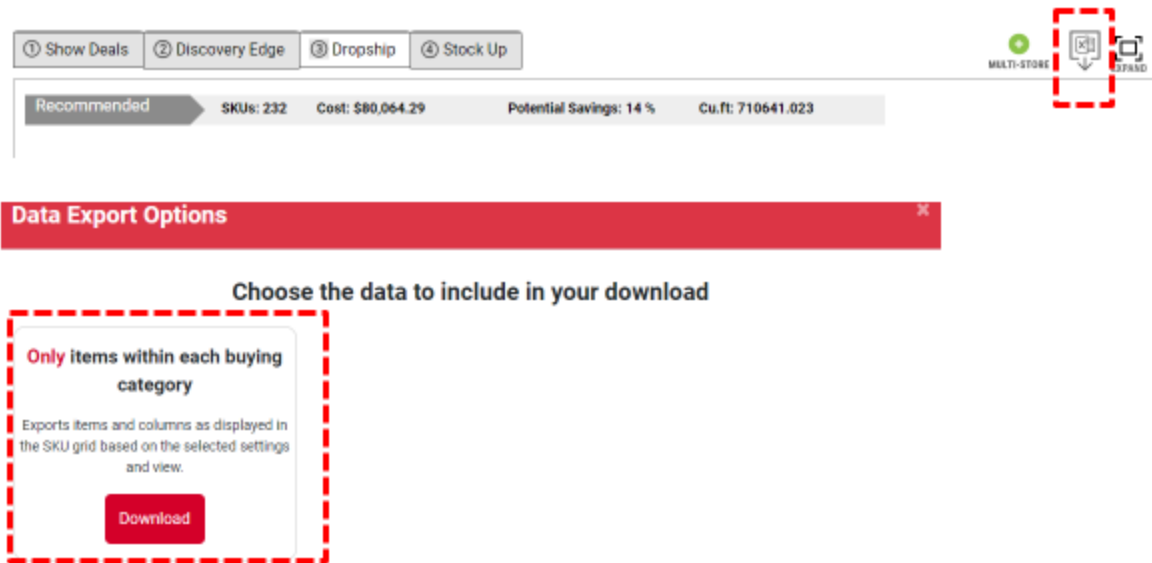
Task 6: Submit Orders to Dropship Vendors

The Preseason Planner allows for the capability to provide suppliers the specific items you plan to buy and suggested order quantities. However, there is no automatic flow of the order into Eagle from ACENET. Ultimately, an item-level purchase order will need to be created in your point-of-sale system. General steps as follows:

Important: From the data export button within the Dropship tab, click **Download**.

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- a. Save the Excel file to your computer titled by vendor name and current year (e.g. Scott21).
- b. Share/review the file with the appropriate dropship vendor for further assessment.
- c. Make any edits to the order in the exported file.
- d. Create a purchase order in Eagle upon submitting the order.

L31.0 Users:

There is updated functionality in your Eagle system that allows you to import and add PO's from a spreadsheet. For more information, see Eagle Help (?) >> What's New in This Release > What's New on Release 30 > What's New on Release 30.1 > Purchasing and Receiving > Data Import and Update Tools Enhancement

- e. See the Ace Way of Retailing best practice titled Purchasing and Receiving Non Ace Order Process. Path: ACENET > About Ace > Ordering > Operations Manual – Ace Way of Retailing – AWOR Search: Purchasing and Receiving Non-Ace

For more information on the Preseason Planner, see microlearning available via the Ace LearningPlace. When in the Ace LearningPlace, at the search bar, search: preseason.

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Additional Resources

- [Preseason Planner](#) - This course provides an overview of the Preseason Planner, a tool to help get you ready for the next big season by creating a simplified way to buy.
- [Preseason Planner Update](#) – This ‘one-stop shop’ application will provide numerous data points to help you make the best decision for your business across Sprint Lawn & Garden, Trim and Winter Goods.

Contact Details:

Team	Type of Assistance	Phone	E-Mail
Store Operations		630-472-4784	